



Getting Started Manual For TreezSoft POS

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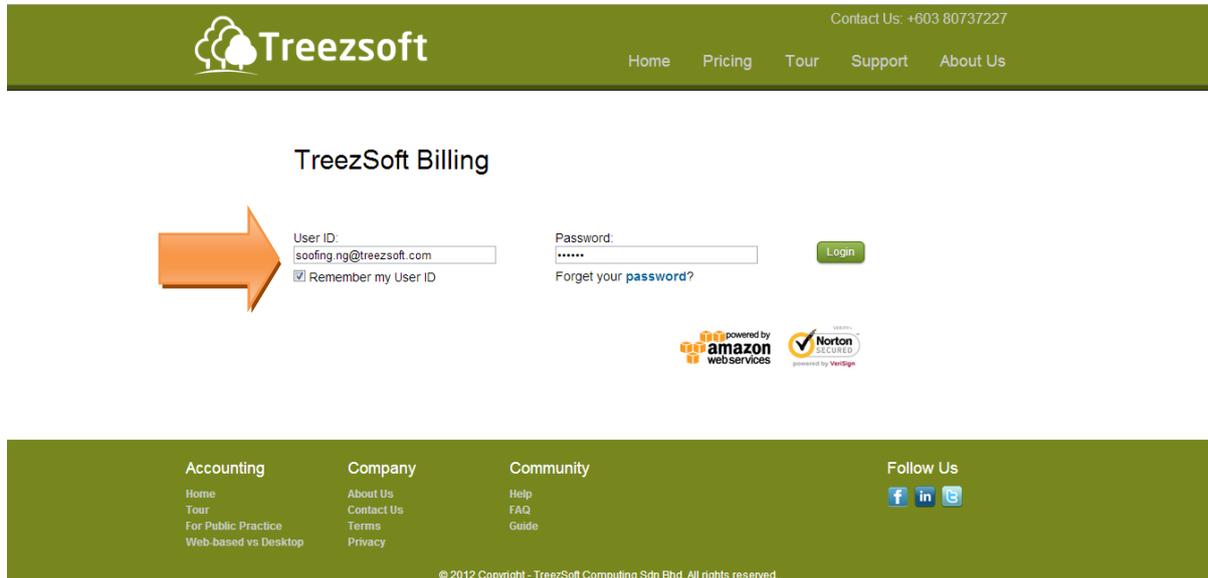
For information about customer support, please visit our homepage at <http://www.treezsoft.com> on the World Wide Web.

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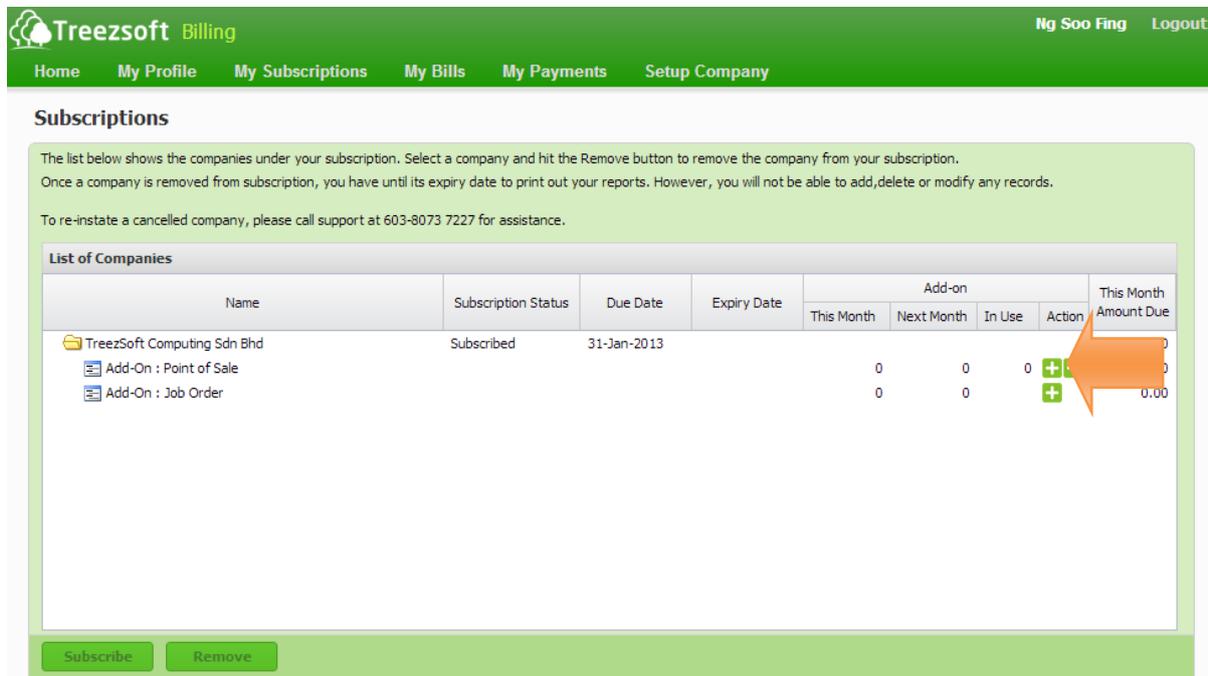
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Step 1: How to Subscribe to POS?



To subscribe for TreezSoft Point-of-Sales system, **go to TreezSoft Billing** (<https://billing.treezsoft.com/>). Enter your User ID & Password (The email & password when you created your account)



Step 1) Look for the Company you want to subscribe POS.

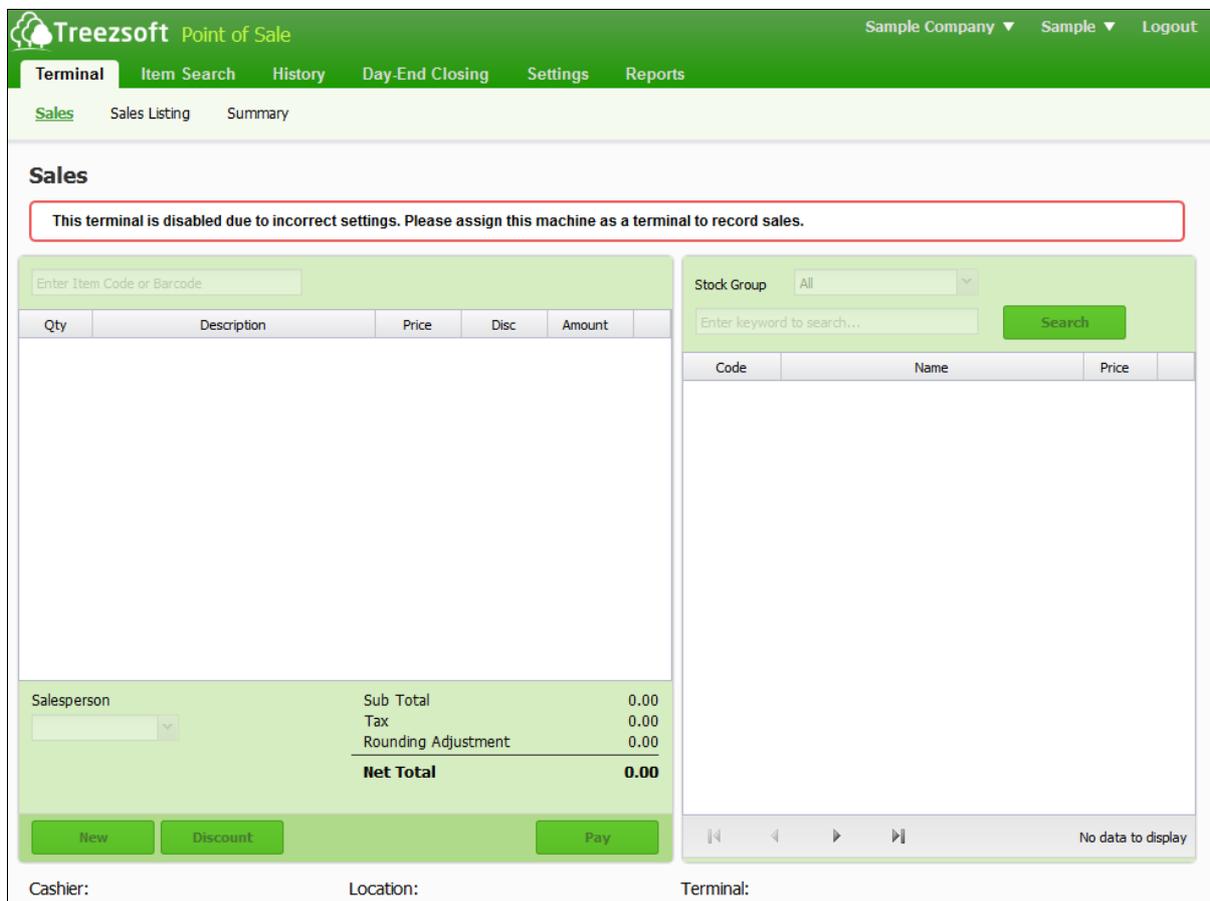
Step 2) Click on  icon to add a license.

Step 2: First Time Login

Once you have finished step 1, it is time to logging into TreezSoft POS for the first time. For first time login, you need to configure all the necessary settings so your POS will be able to run smoothly during your business operations. To do the configuration, you are required to login using your administrative ID (the email address you used to register TreezSoft Accounting with)

To login, please go to <https://accounting.treezsoft.com/pos>

Now you have logged into TreezSoft POS. The illustrated image is the main screen you will see.



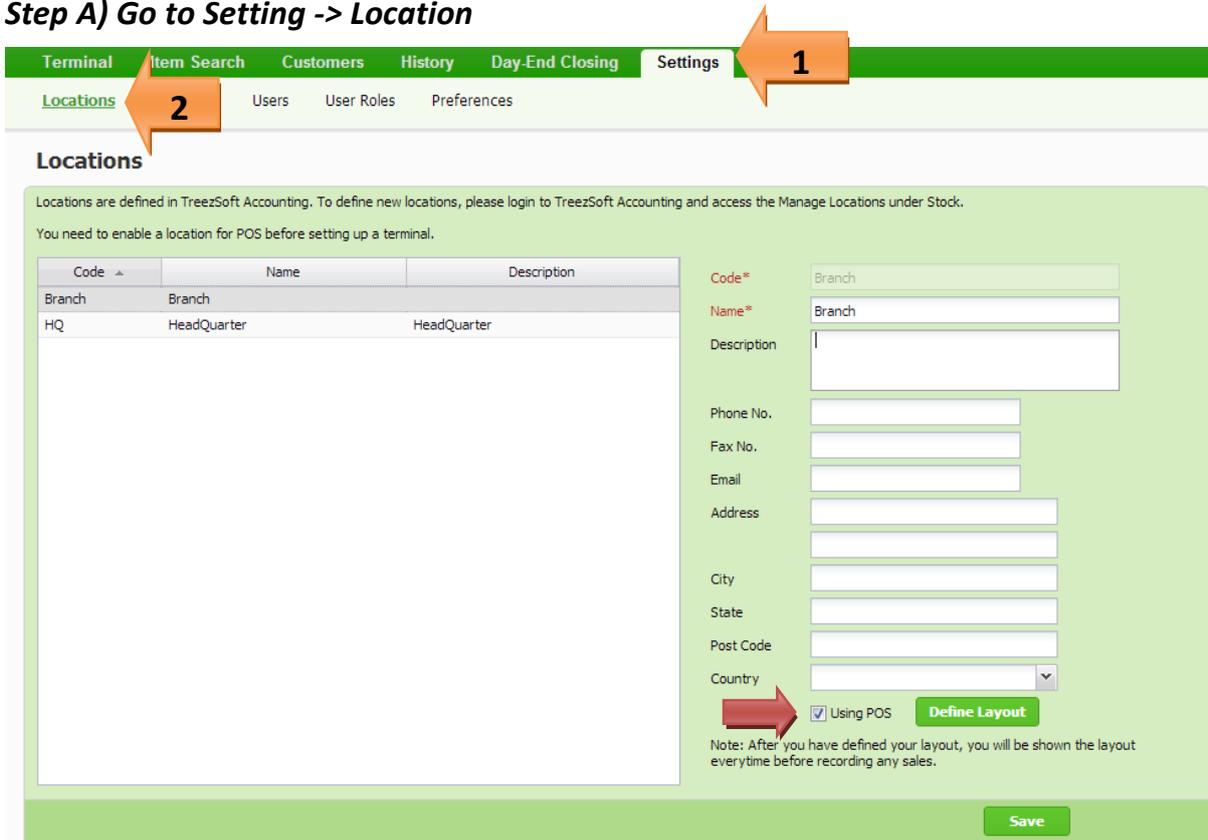
The screenshot shows the TreezSoft Point of Sale interface. At the top, there is a green header with the TreezSoft logo and 'Point of Sale' text. On the right side of the header, there are dropdown menus for 'Sample Company' and 'Sample', and a 'Logout' button. Below the header is a navigation bar with tabs for 'Terminal', 'Item Search', 'History', 'Day-End Closing', 'Settings', and 'Reports'. Under the 'Terminal' tab, there are sub-tabs for 'Sales', 'Sales Listing', and 'Summary'. The main content area is titled 'Sales' and features a red-bordered warning message: 'This terminal is disabled due to incorrect settings. Please assign this machine as a terminal to record sales.' Below the warning, there is a search bar for 'Enter Item Code or Barcode' and a 'Stock Group' dropdown menu set to 'All'. A search button is located to the right of the search bar. Below the search bar is a table with columns for 'Code', 'Name', and 'Price'. At the bottom of the main content area, there is a summary section with a 'Salesperson' dropdown, a 'Sub Total' of 0.00, 'Tax' of 0.00, 'Rounding Adjustment' of 0.00, and a 'Net Total' of 0.00. There are three buttons: 'New', 'Discount', and 'Pay'. At the bottom of the interface, there are labels for 'Cashier:', 'Location:', and 'Terminal:'. The bottom right corner of the interface shows 'No data to display'.

Please be noted that you will see the warning message:

This terminal is disabled due to incorrect settings. Please assign this machine as a terminal to record sales.

It is normal to see this warning message because your terminal has yet to be configured. Follow the simple next instructions to configure the settings accordingly.

Step A) Go to Setting -> Location



Locations are defined in TreezSoft Accounting. To define new locations, please login to TreezSoft Accounting and access the Manage Locations under Stock.

You need to enable a location for POS before setting up a terminal.

Code	Name	Description
Branch	Branch	
HQ	HeadQuarter	HeadQuarter

Code*

Name*

Description

Phone No.

Fax No.

Email

Address

City

State

Post Code

Country

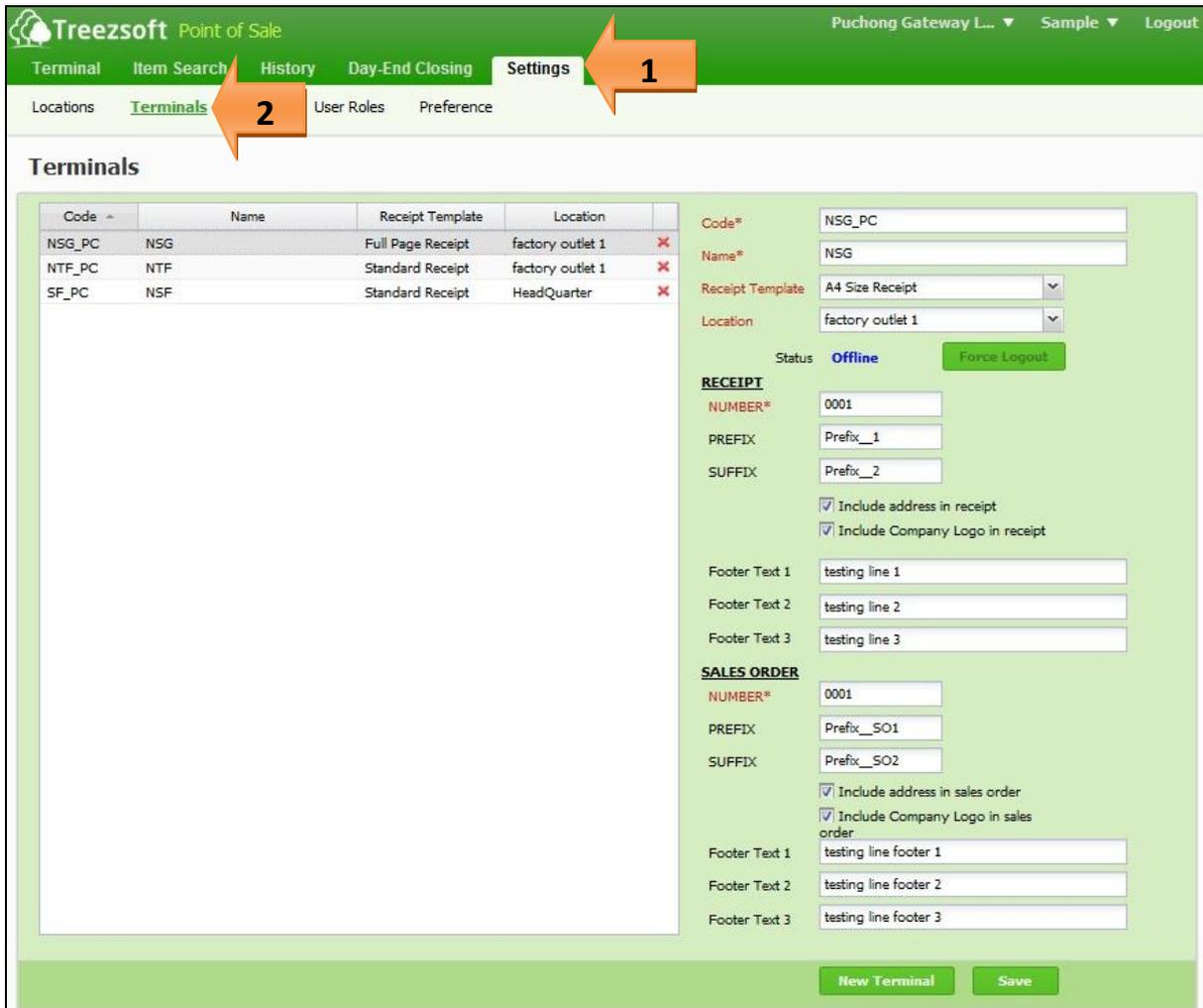
Using POS

Note: After you have defined your layout, you will be shown the layout everytime before recording any sales.

1. Select the location you want to enable POS with, and then **mark a tick in the checkbox** (as shown in the illustration).
2. Click **Save** to confirm your selection.

Be informed that the locations are only definable in TreezSoft Accounting.

Step B) Go to Setting -> Terminal Setup



The screenshot shows the TreezSoft Point of Sale interface. At the top, there is a navigation bar with the following items: Terminal, Item Search, History, Day-End Closing, Settings (highlighted with an orange arrow labeled '1'), Puchong Gateway L..., Sample, and Logout. Below the navigation bar, there is a sub-menu with the following items: Locations, Terminals (highlighted with an orange arrow labeled '2'), User Roles, and Preference. The main content area is titled 'Terminals' and contains a table of existing terminals and a form for creating a new terminal.

Code	Name	Receipt Template	Location
NSG_PC	NSG	Full Page Receipt	factory outlet 1
NTF_PC	NTF	Standard Receipt	factory outlet 1
SF_PC	NSF	Standard Receipt	HeadQuarter

The form for creating a new terminal includes the following fields:

- Code*: NSG_PC
- Name*: NSG
- Receipt Template: A4 Size Receipt
- Location: factory outlet 1
- Status: Offline (Force Logout button)
- RECEIPT NUMBER*: 0001
- PREFIX: Prefix_1
- SUFFIX: Prefix_2
- Include address in receipt:
- Include Company Logo in receipt:
- Footer Text 1: testing line 1
- Footer Text 2: testing line 2
- Footer Text 3: testing line 3
- SALES ORDER NUMBER*: 0001
- PREFIX: Prefix_SO1
- SUFFIX: Prefix_SO2
- Include address in sales order:
- Include Company Logo in sales order:
- Footer Text 1: testing line footer 1
- Footer Text 2: testing line footer 2
- Footer Text 3: testing line footer 3

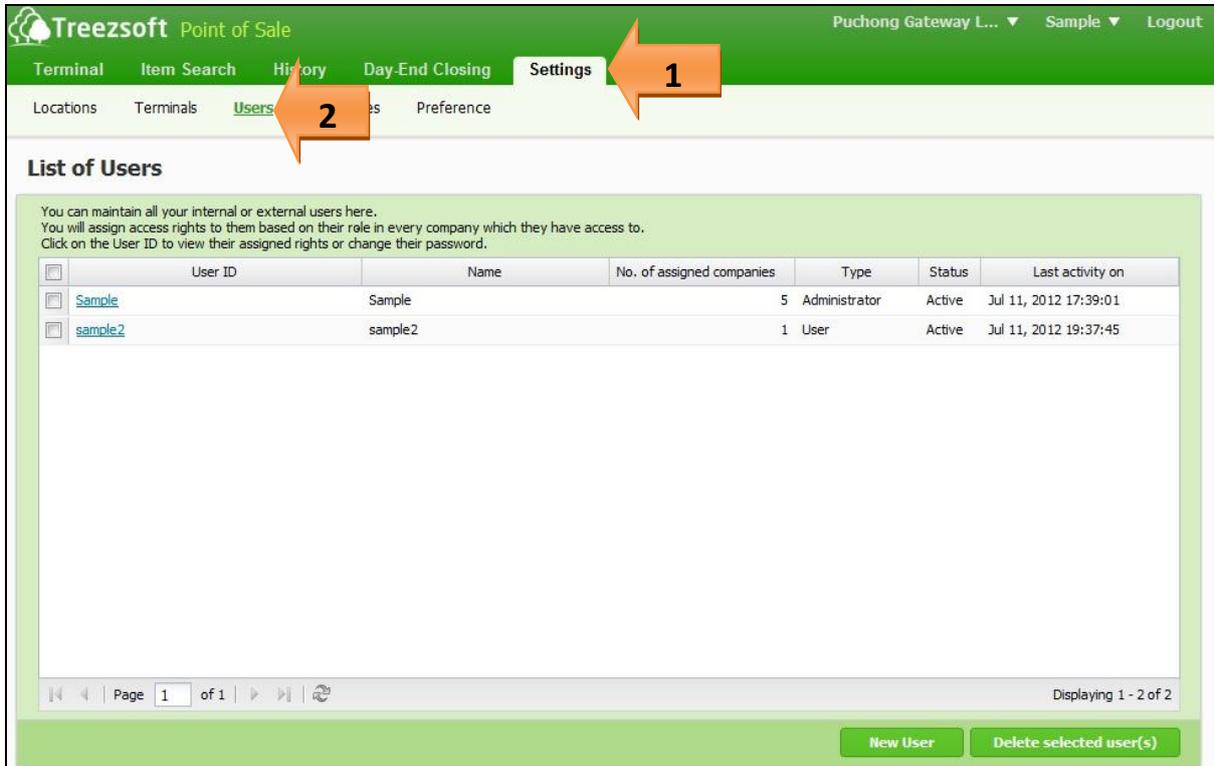
At the bottom of the form, there are two buttons: 'New Terminal' and 'Save'.

1. Click on **New Terminal** to create a terminal.
2. Enter the details accordingly. Fields mark with asterisks (*) are required fields.
3. After configuring your settings, click on **Save** to confirm the records.

A friendly reminder: You might want to try printing out the receipt/sales order to see how is your receipt/sales order's Prefixes/Suffixes/Footers look like.

Step C) Go to Setting -> Users

C-i) List of Users



List of Users

You can maintain all your internal or external users here.
You will assign access rights to them based on their role in every company which they have access to.
Click on the User ID to view their assigned rights or change their password.

<input type="checkbox"/>	User ID	Name	No. of assigned companies	Type	Status	Last activity on
<input type="checkbox"/>	Sample	Sample	5	Administrator	Active	Jul 11, 2012 17:39:01
<input type="checkbox"/>	sample2	sample2	1	User	Active	Jul 11, 2012 19:37:45

Page 1 of 1 | Displaying 1 - 2 of 2

[New User](#) [Delete selected user\(s\)](#)

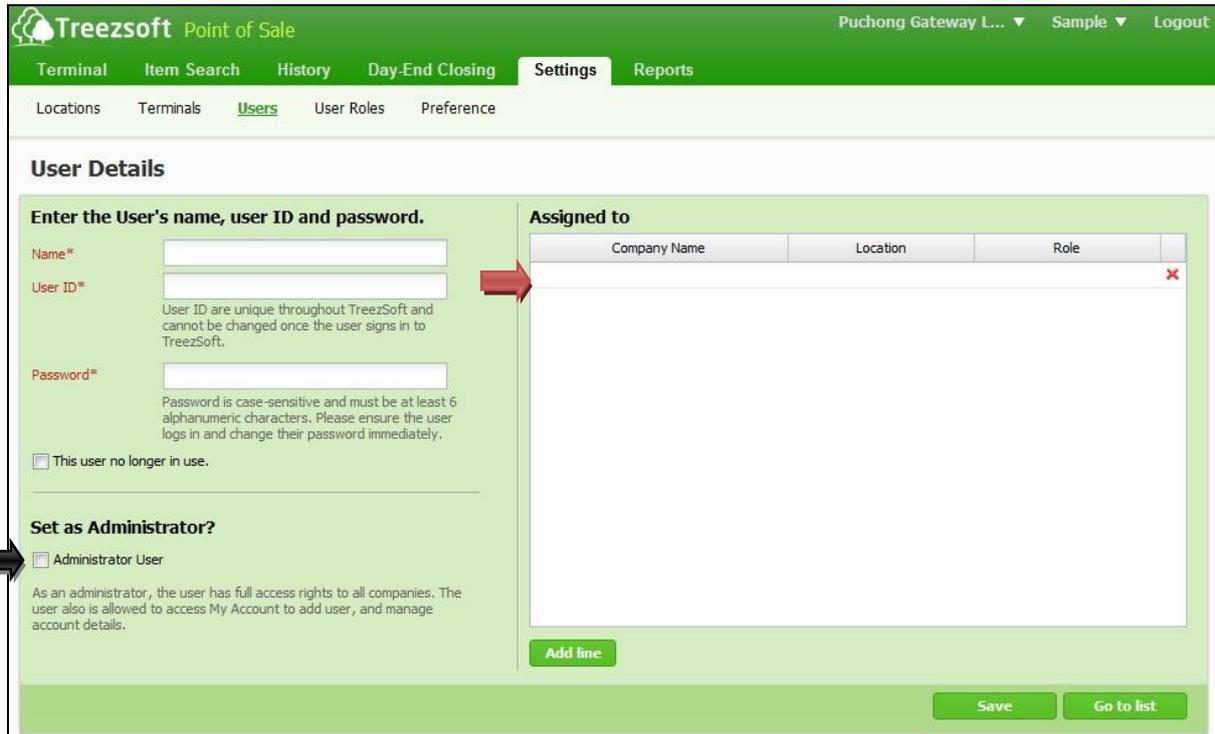
As illustrated is the List of Users screen. It will display all the users you have created in TreezSoft.

Click on **New User** to setup a user.

1. If you want to edit a user, click on the [hyperlinked username](#).
2. To delete user(s), tick on the checkbox next to him and then click **Delete selected user(s)**.

This action is irreversible so please consider carefully.

C-ii) Manage User Details / Create User



User Details

Enter the User's name, user ID and password.

Name*

User ID*

User ID are unique throughout TreezSoft and cannot be changed once the user signs in to TreezSoft.

Password*

Password is case-sensitive and must be at least 6 alphanumeric characters. Please ensure the user logs in and change their password immediately.

This user no longer in use.

Set as Administrator?

Administrator User

As an administrator, the user has full access rights to all companies. The user also is allowed to access My Account to add user, and manage account details.

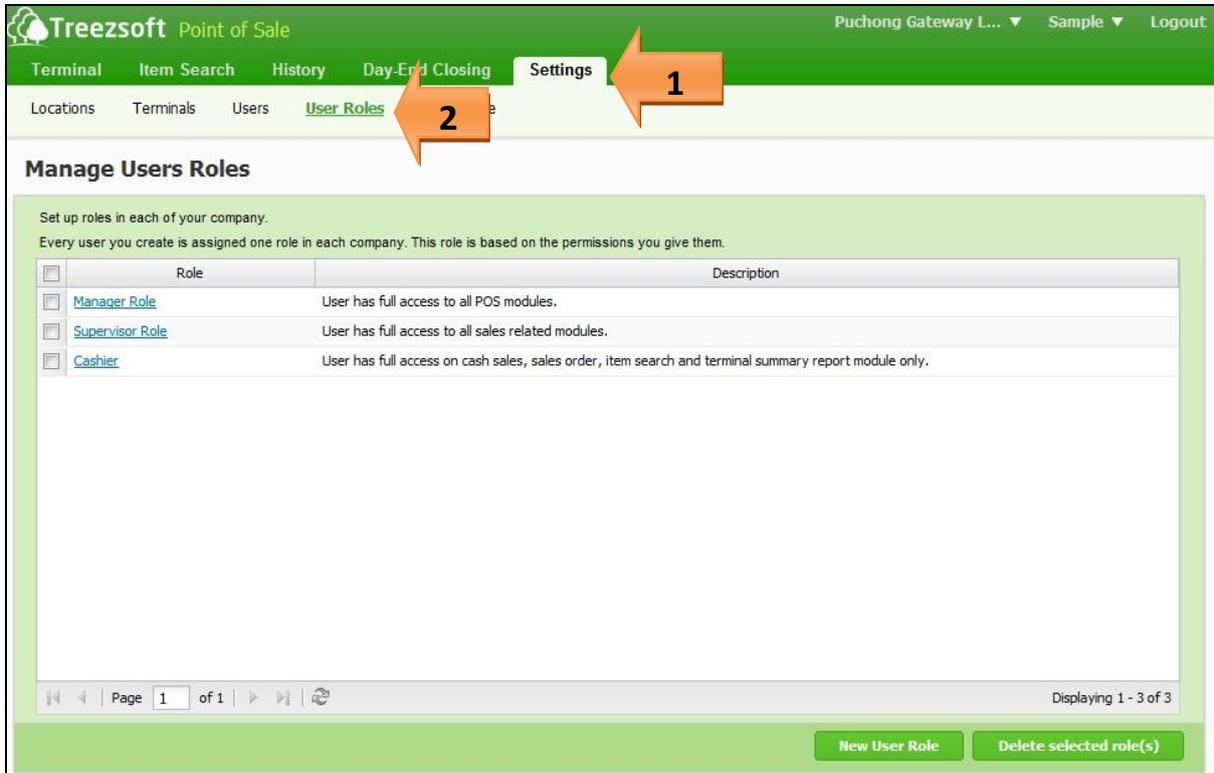
Assigned to

Company Name	Location	Role

1. Enter the desired name, user ID and password into the particular fields. Fields mark with asterisk (*) are required fields.
2. Assign the user to the specific company and his roles on the right section (As illustrated with the red arrow).
3. If you want to assign more than one company to the user, click Add line to add additional companies to him.
4. If you want to assign the user as administrator of TreezSoft POS, tick the checkbox which is below of the “**Set as Administrator?**” (As illustrated with the black arrow).
5. Click on **Save** to confirm your records.

Step D) Go to Setting -> User Roles

D-i) Manage User Roles



The screenshot displays the 'Manage Users Roles' page in the TreezSoft POS system. The navigation menu at the top includes 'Terminal', 'Item Search', 'History', 'Day-End Closing', and 'Settings'. The 'Settings' menu is highlighted with an orange arrow labeled '1'. Below it, the 'User Roles' sub-menu is highlighted with an orange arrow labeled '2'. The main content area is titled 'Manage Users Roles' and contains the following text: 'Set up roles in each of your company. Every user you create is assigned one role in each company. This role is based on the permissions you give them.' Below this text is a table with the following data:

<input type="checkbox"/>	Role	Description
<input type="checkbox"/>	Manager Role	User has full access to all POS modules.
<input type="checkbox"/>	Supervisor Role	User has full access to all sales related modules.
<input type="checkbox"/>	Cashier	User has full access on cash sales, sales order, item search and terminal summary report module only.

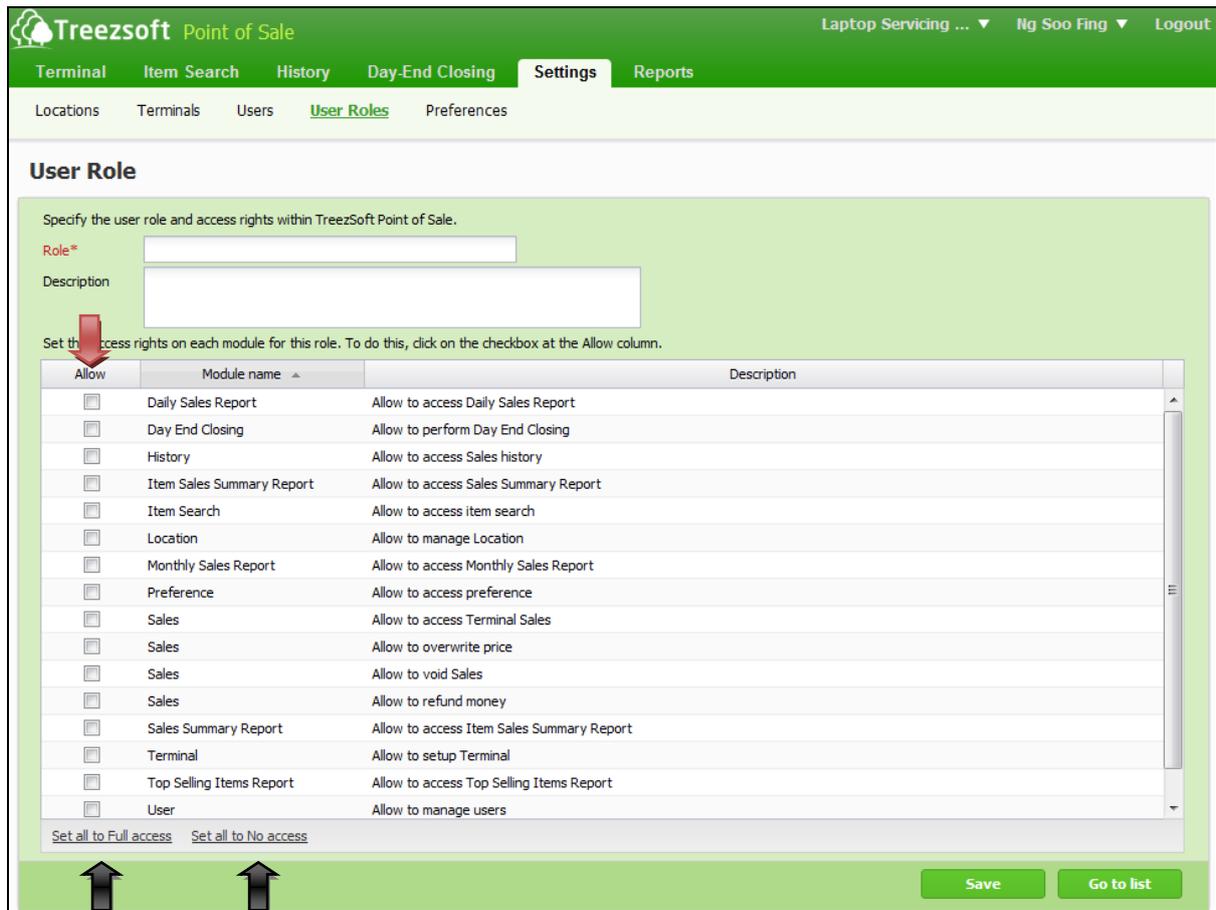
At the bottom of the page, there are two buttons: 'New User Role' and 'Delete selected role(s)'. The page footer indicates 'Page 1 of 1' and 'Displaying 1 - 3 of 3'.

After setting up users, you shall then proceed to manage the user roles. As illustrated above is the list of User Roles defaulted by the system. It will also display other user roles you have created in TreezSoft POS. (Be noted that all copy(s) of your TreezSoft POS will share the same user roles. Redefining new roles are not required.)

1. Click on **New User Role** to setup a user role.
2. If you want to edit an existing user role, click on the [hyperlinked user role type](#).
3. To delete user role(s), tick on the checkbox next to it and then click **Delete selected role(s)**.

Deleting a user role is irreversible so please consider carefully.

D-ii) Creating a New User Role



Specify the user role and access rights within TreezSoft Point of Sale.

Role*

Description

Set the access rights on each module for this role. To do this, click on the checkbox at the Allow column.

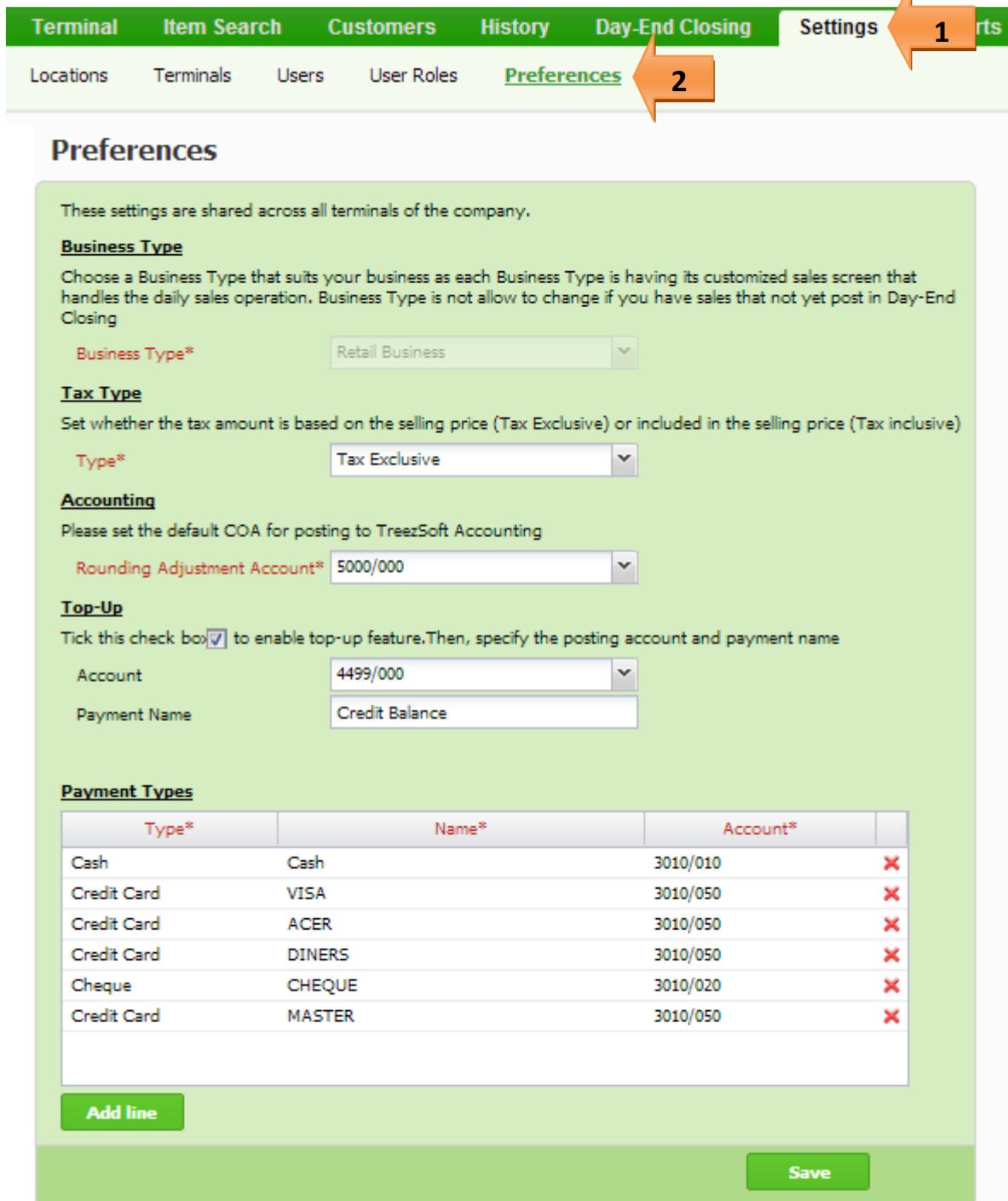
Allow	Module name	Description
<input type="checkbox"/>	Daily Sales Report	Allow to access Daily Sales Report
<input type="checkbox"/>	Day End Closing	Allow to perform Day End Closing
<input type="checkbox"/>	History	Allow to access Sales history
<input type="checkbox"/>	Item Sales Summary Report	Allow to access Sales Summary Report
<input type="checkbox"/>	Item Search	Allow to access item search
<input type="checkbox"/>	Location	Allow to manage Location
<input type="checkbox"/>	Monthly Sales Report	Allow to access Monthly Sales Report
<input type="checkbox"/>	Preference	Allow to access preference
<input type="checkbox"/>	Sales	Allow to access Terminal Sales
<input type="checkbox"/>	Sales	Allow to overwrite price
<input type="checkbox"/>	Sales	Allow to void Sales
<input type="checkbox"/>	Sales	Allow to refund money
<input type="checkbox"/>	Sales Summary Report	Allow to access Item Sales Summary Report
<input type="checkbox"/>	Terminal	Allow to setup Terminal
<input type="checkbox"/>	Top Selling Items Report	Allow to access Top Selling Items Report
<input type="checkbox"/>	User	Allow to manage users

[Set all to Full access](#) [Set all to No access](#)

Save **Go to list**

1. Enter the desired Role name and description. Field(s) mark with asterisk (*) is required field.
2. To set access rights on each module for the role, tick the checkbox at the Allow column. (As illustrated with the red arrow)
3. To set either full access or no access to the role, click on the hyperlinked text. (As illustrated with the black arrow)
4. Click on **Save** to confirm your selections.

Step E) Go to Setting -> Preferences



These settings are shared across all terminals of the company.

Business Type
Choose a Business Type that suits your business as each Business Type is having its customized sales screen that handles the daily sales operation. Business Type is not allow to change if you have sales that not yet post in Day-End Closing

Business Type* Retail Business

Tax Type
Set whether the tax amount is based on the selling price (Tax Exclusive) or included in the selling price (Tax inclusive)

Type* Tax Exclusive

Accounting
Please set the default COA for posting to TreezSoft Accounting

Rounding Adjustment Account* 5000/000

Top-Up
Tick this check box to enable top-up feature. Then, specify the posting account and payment name

Account 4499/000

Payment Name Credit Balance

Payment Types

Type*	Name*	Account*	
Cash	Cash	3010/010	✘
Credit Card	VISA	3010/050	✘
Credit Card	ACER	3010/050	✘
Credit Card	DINERS	3010/050	✘
Cheque	CHEQUE	3010/020	✘
Credit Card	MASTER	3010/050	✘

Add line

Save

Preferences are where you setup your Business Type and Accounts posting. This is a very important step because the setting in this screen will determine where the sales will be posted to.

The account codes are all linked up with TreezSoft Accounting, so you do not have to define new account codes. Click on the dropdown arrow you will find an exactly same set of account codes here.

Business Type:

- There are two types of business types:
 - a) Retail business: Select this if your business is a retail business
 - b) Massage/Spa Business: Select this if your business is a massage/spa business

Tax Type:

- Set if all the selling prices are tax inclusive or exclusive

Accounting:

- To set the account which rounding adjustments will be posted to

Top-up:

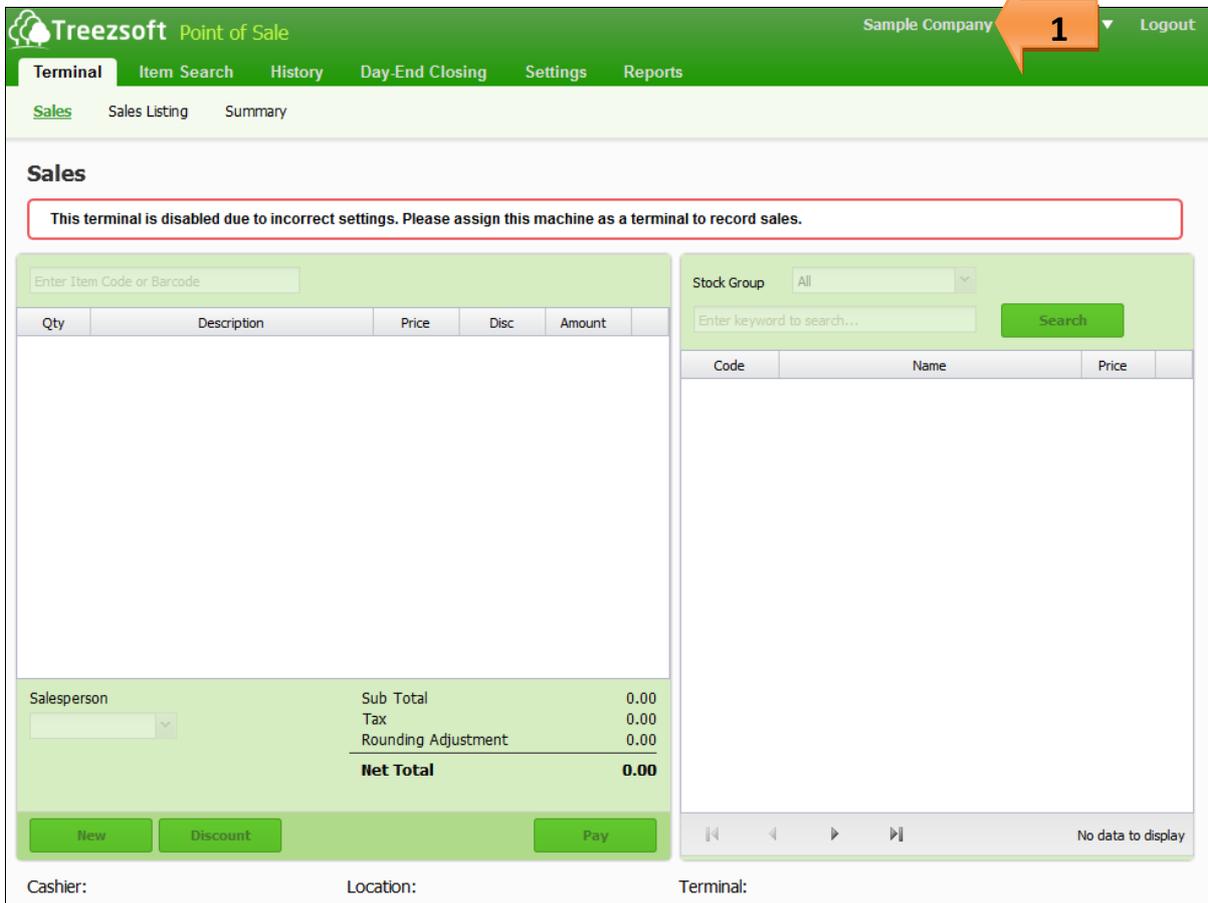
- To set the account which credit top-ups will be posted to

Payment Types:

- To set the accounts which payments will be posted to

Step 3: Nearly Finish!

To complete the setting up of the terminal; you are required to do these final steps:



Step 1) Click on the company name



Step 2) A popup (As illustrated above) will be displayed, click on **Assign Terminal** to assign this computer as the POS terminal for this location.

Switch Company - You can switch from current company to the other (if you assign more than one companies to the current user ID) by clicking on it, to view the reports or history. However once you switch to a company different than the currently assigned terminal. You will not be able to perform any sales until you switch back.

Assign Terminal

To assign this computer as a terminal, please select the location and terminal it represents.

To setup a terminal, please go to Setting > Terminals

Location:

Terminal:

Step 3) After clicking on Assign Terminal, you will see this popup window. Enter the Location and the Terminal you want to assign with. Click OK to confirm and proceed.

Hardware Requirements

Barcode Scanners

Almost any barcode scanner will work as long as it can read code-128 and is programmed to hit return (enter) after scanning each item.

Receipt Printers

The recommended receipt printer for TreezSoft POS is the **Optimus C2008** using the Firefox browser, the Chrome browser or the Safari browser. Although this is the recommended printer, you can try your own to see if it will work correctly. (Make sure to set margins to 0 and remove any headers/footers).

Cash Drawers

The only types of cash drawers that are possible to support (that open automatically) are the ones that connect to a receipt printer such as **MK-410**. This is because we require the RJ11 cable (telephony port) to trigger the cash drawer to come out automatically.